

FIG. 1

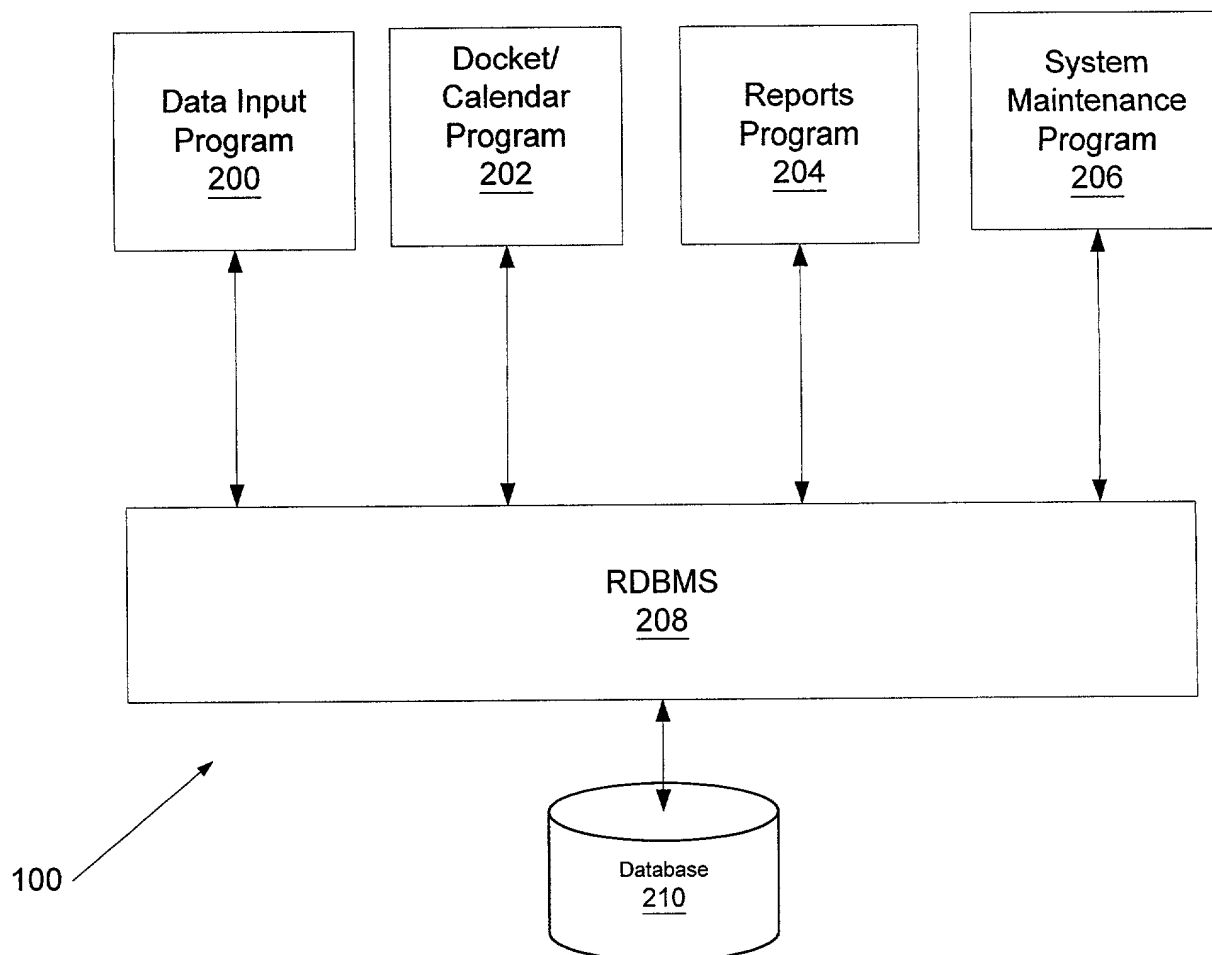


FIG. 2A

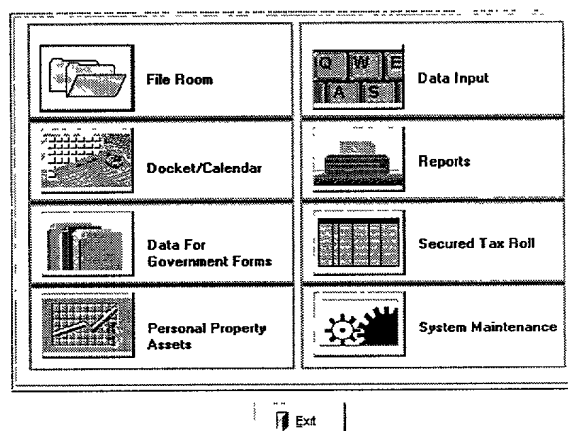


FIG. 2B Main Window

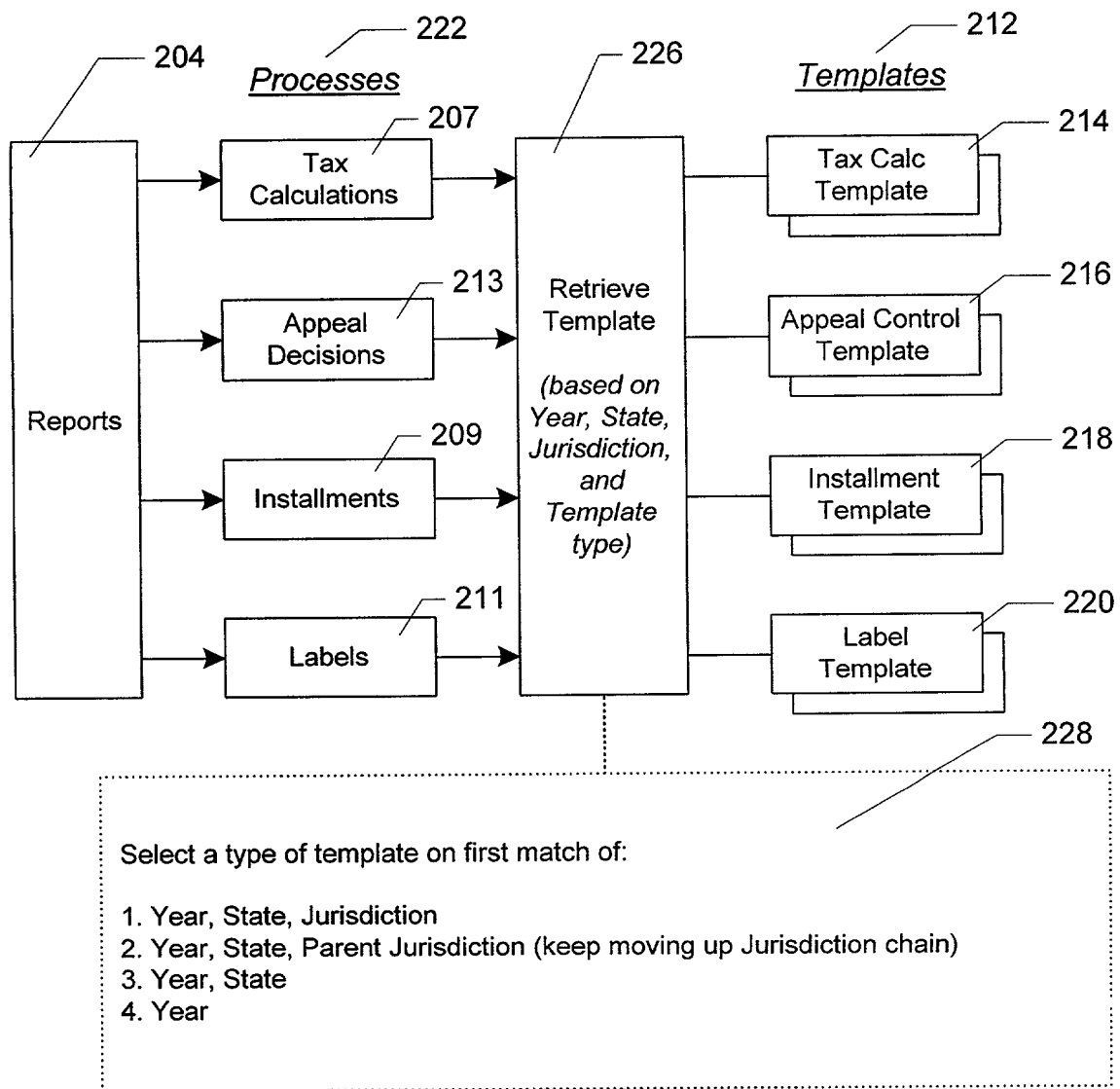


FIG. 3

FIG. 4 Parcel Record

FIG. 5 Calculate Tax

284

286

282

288

752

754

**Assessment Track**

Type: ☒ RE ☐ FP ☐ SUP ☐ NAV

Track ID: 1

Tax Bill: N25

Tax Bill Amt: 0.00

☒ Plug Tax Rate ☐ Projected

FCV Rate: 0.100000

LPV Rate: 0.052690

Eq. Rate: 1.000000

☐ This is a Parcel Track

This track supercedes:

On:

Descr:

☒ Include Assessment

**Assessment Detail**

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount
Interim	900,000	720,000	400,000	500,000	109,929.60

Change Order: Move Up Move Down

Projected values are marked with an asterisk (\*)

Subtype: Interim Class: 5 ☐ Projected?

Actual Value		Land		Improvements	
FCV	900,000	500,000	400,000	FCV Ratio:	80.000000
Asd FCV	720,000	400,000	320,000	FCV Imp Ratio:	?
LPV	900,000	Asd LPV	720,000	LPV Ratio:	80.000000

FIG. 6 Assessments

292

290

Juris Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdiction: MAR

Dist Code: 031600

Class: 8

FCV Rate: 0.037028

LPV Rate: 0.102171

Rate Year: 1997

☐ Special District

Type:

Amount: ?

FIG. 7 Districts

296
298
284
294

Appeal
Billing

**Select a Track and/or Appeal:**

Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PP1	No	No	
REAL	1	No	No	

A Tracks With Appeal Activity

**Appeal Record**

Appeal #:   
 Appeal Ref:   
 Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal  
 Appeal Reasons: 

--	--	--	--	--	--	--	--	--	--

  
 Responsible Professional:   
 Working Professional:   
 Consultant:   
 Appellant Code: ?  Appellant Other Info:   
 Appeal Code: ?  Appeal Other Info:   
 Refund Expected: ?  Refund Received: ?  Tax Credit: ?   
 Notes:

Billing#:  Date Created: 12/28/98  
 Complainant:   
 Override standard appeal at: Level 0 Hearing: 0  
 Status:   
☒ Allocated?  
☐ Consultant Engaged

FIG. 8 Appeal Record

296
298
302

Appeal
Billing

**Select a Track and/or Appeal:**

Type	Group	Prorata	ECA	Appeal Reference
REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Billing Information			Fee Agreement #1		Fee Agreement #2		Fee Agreement #3	
Billing Type	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount
Contingency	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:			Form:		Form:		Form:	

☐ Multiple Years
 

Final Year:

**Referral**

Firm:   
☒ Contingency ☐ Flat Fee

Contact:   
 Amount:  0.00

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Level	Hearing
1	1

Tax Amount: 1,000.00  
Calc Tax Amount: ?

Appeal Level: 1  
Appeal #: 3001

Hearing: 1  
Class: 5

☒ File Appeal  
☐ Litigation

☐ Outside Appeal  
☐ Skip Level

	Requested	Actual Value	Land	Improvements	Date	Time
Requested FCV:	9,000	90,000	20,000	70,000	Filing Deadline:	12/01/97 12:00 PM
Requested Asd FCV:	900	90,000	20,000	70,000	Date Filed:	11/30/97 09:00 AM
FCV Ratio:	10.00000000	100.00000000		FCV Imp Ratio: ?	Hearing:	01/20/97 02:00 PM
Requested LPV:	8,000	89,000	Requested LPV Ratio:	99.00000000	Decision:	02/19/98 04:00 AM
Requested Asd LPV:	7,920	89,000	Actual LPV Ratio:	100.00000000		

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbschgsfg
000-00-0006	Patti's Property	Just a really big property.

Switch To Subparcel...

Parcel: --

FIG. 11 Subparcels

308

310

Budget Name	Default
NAV Only	no
Personal Only	no
Real Only	yes
Sup Only	no

332

334

336

Open Budget

Select Default Budget

Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press "Open Budget" to go in to the budget worksheet.

312

Budget Name:

Date Saved:  Time Saved: 4:54 pm

Saved By:  ☐ Combined Property

314

Annual Increase Rates:

FCV Increase:  FCV Rate Increase:

316

320

LPV Increase:  LPV Rate Increase:

Other Parameters:

Years To Forecast:  ☐ Entire Property

318

324

Equalization Ratio:  ☐ Track Installments

326

Budget On This Track Type:

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

322

Notes:

328

FIG. 12 Create Budgets

338

**Budget Worksheet for Scot Test**

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID:

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030500	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00
2004	114,869	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show:

☒ Tax From 1997

☐ Installments Due in 1997

340

342

344

346

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

FIG. 13 Budget Worksheet

348

IB	Required Date	Payee	Asmt Type	Track ID	Tax Bill#	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP35163135165165	25,000.00	0.00	25,000.00	07/01/97
1	11/03/97	AZ-MARICOPA-T	REAL	1	N25	52,954.80	0.00	52,954.80	07/01/97
2	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,954.80	0.00	52,954.80	05/01/98

Asmt Types: <input checked="" type="radio"/> Real <input type="radio"/> Supplemental <input type="radio"/> Personal Property <input type="radio"/> NAV				Track ID: 1	Chrg Less Disc: 130,929.60
Instalment: 0	<input type="checkbox"/> Estimate?	Payee: AZ-MARICOPA-T			
Tax Bill#: ?	Chk Req #: 0	Check Num: 0			
Charges: Date, Principal: 0.00, Penalty: 0.00, Interest: 0.00			Discount: 0.00, Payments: 0.00		
Status: Released			Auto Add		
Entry Date:			Mailed Date:		
Unpaid Amt: 0.00			Balance to Pay: 0.00		

350

FIG. 14 Accounts Payable

352

**Auto Add**

**A/P Entries**

☒ Divide into Installments

☒ Include Discounts

☒ Include Payments

☐ Skip Tracks Already Brought Over

**Track Types**

☒ Real ☐ Supplemental ☒ Personal ☐ NAV

OK

Cancel

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

**This jurisdiction is getting its rules from:**

Arizona (Real)

Arizona (Personal)

FIG. 15 Auto Add

354

Client ID	Name	Active?
2802	HUNTERS GLEN APARTMENTS	Y
2803	LIBERTY II LP	Y
2804	FIRST UNION REAL ESTATE EQUI	Y
2805	RON SHOFFET	Y
2806	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Partners	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Meritt	Y

Client ID 1001

366

356

Client ID: 9998 Client Name: Ashley Eleanor Meritt Client #: 9998 Billing #: 9998 Contact

Type: Client SubType: Current Responsible Attorney: RJT Rich J. Truly

358

Address: 8000 N. Barney Lane Notes

Mailing Address: P O Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarati.com

Phone: 602-900-9998 Extension: Active: Y

Fax: 602-900-9997 Region:

360

362

Parent ID: 9999 Path Naccarati Referral ID: Referring Individual: Referral Terms:

364

368

FIG. 16 Address Information

370

372 454 452 456 490

371

Contact Maintenance

Indv ID	Full Name
1	Jackie D. Quinn

Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

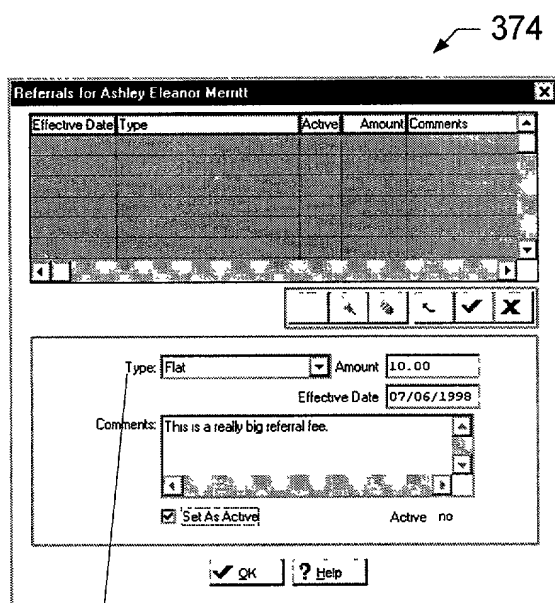
☐ Address is Same as Client

Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

FIG. 17 Contacts



**FIG. 18 Referral**

Figure 1 illustrates a graphical user interface for a legal database. The interface includes a table with the following columns: Individual Id, Name, Title, and Number. The table lists several attorneys, with the entry for 'PAI' (Patti Accardi) highlighted. To the right of the table is a search input field labeled '391'. Below the table is a form with fields for 'Individual Id', 'Name', 'Number', and 'Attorney', with the entry for 'AEM' (Ashley Eleanor Merritt) shown.

Individual Id	Name	Title	Number
MKP	Mikhail Krutakov Perovski	Attorney	9
MSK	Miya S. Kravky	Attorney	102
PAI	Patti Accardi	Attorney	9999
RDN	Richard D. Nearhood	Attorney	1
RDNI	R. Nearhood	Attorney	1
RJT	Rich J. Truly	Attorney	103
WIS	W. I. Stein	Attorney	100
WIS	W. I. Stein, Jr.	Attorney	101

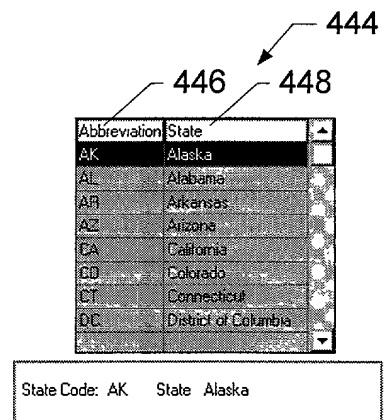
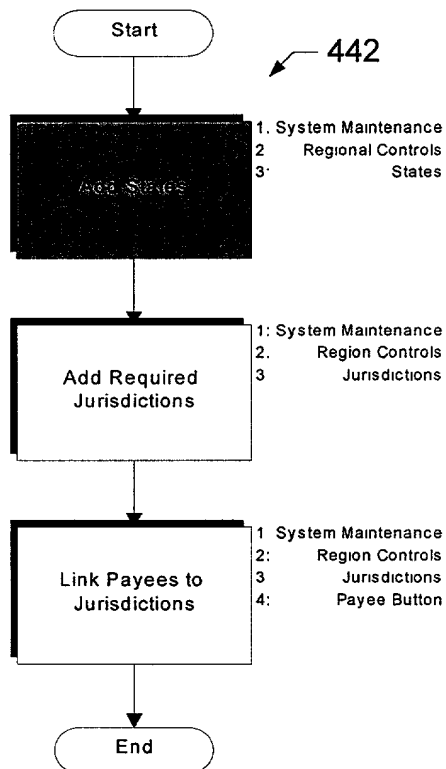
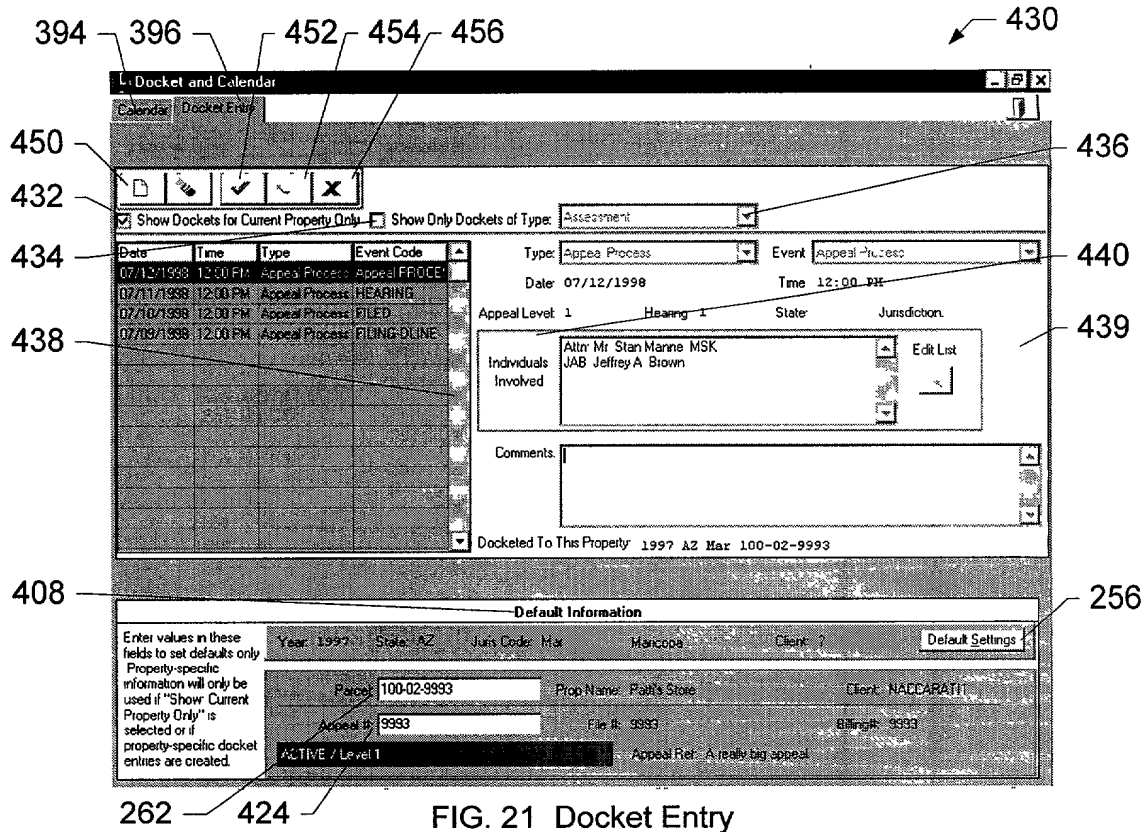
Search Input: 391

Form Fields:

- Individual Id: AEM
- Name: Ashley Eleanor Merritt
- Number: 998
- Attorney: N

**FIG. 19 Working Professionals**

FIG. 20 Calendar



406

458

234

Jurisdiction Maintenance

Other Edit Navigator Save

464

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

1 Select a state.

2. Select a jurisdiction.

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
CDC	Coconino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRE	Greenlee	1995	

Sub-Jurisdictions:

Juris Code	Juris Name

466

470

472

473

474

State: AZ

Rate Year: 0

Parent Juris Code:

Juris Cd:

Juris Name:

Parcel Format

Default Payee ID ?

Payee

from 1 properties

FIG. 24 Jurisdiction Set Up

486

406

452

456

476

482

490

478

480

492

Payees for MAR/AZ

Payee ID:  ☐ Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual:

Notes

Contacts

Referral Terms

FIG. 25 Jurisdiction Payee

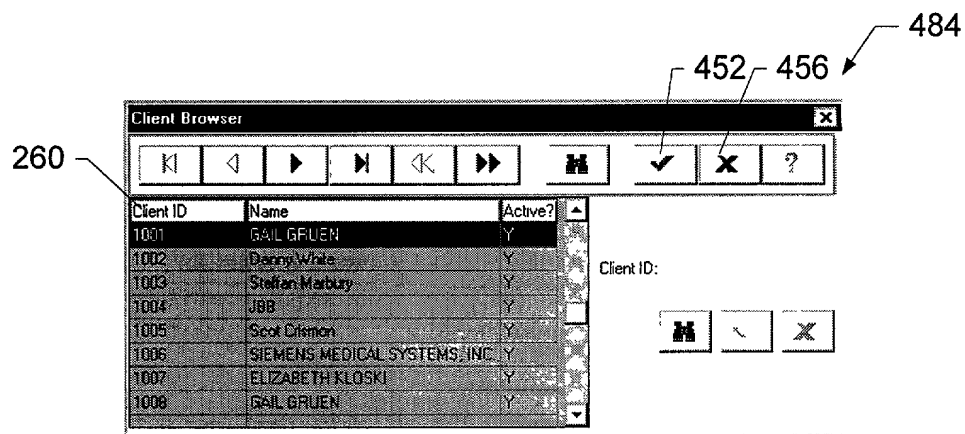


FIG. 26 Client Browser

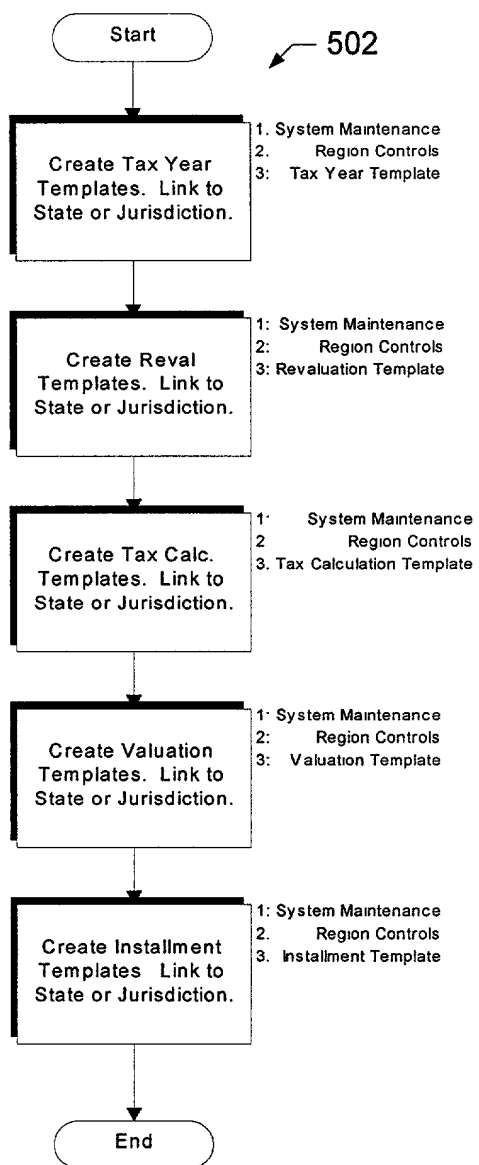


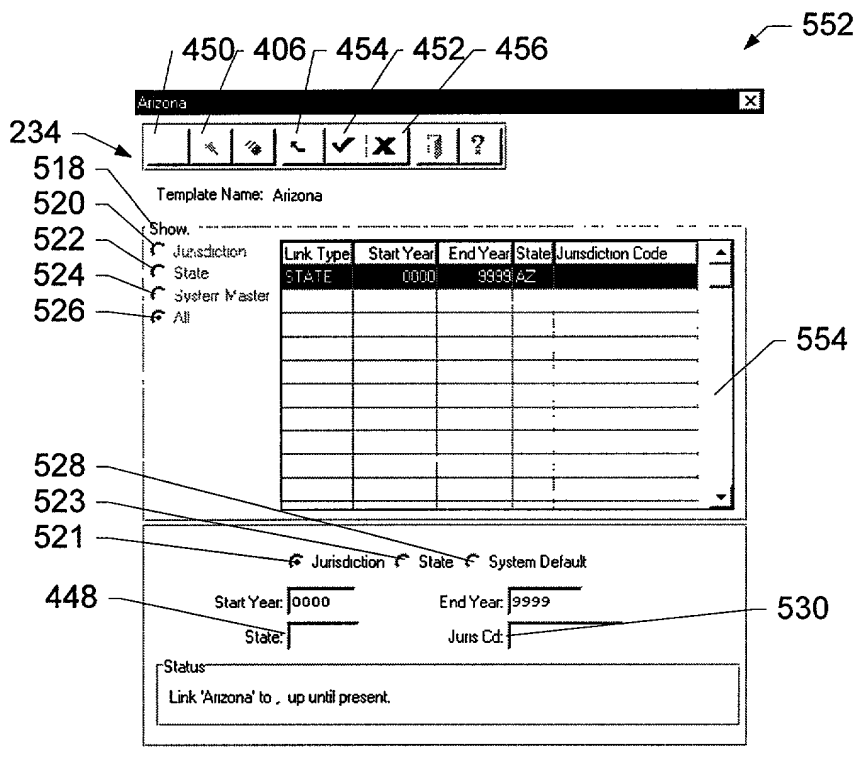
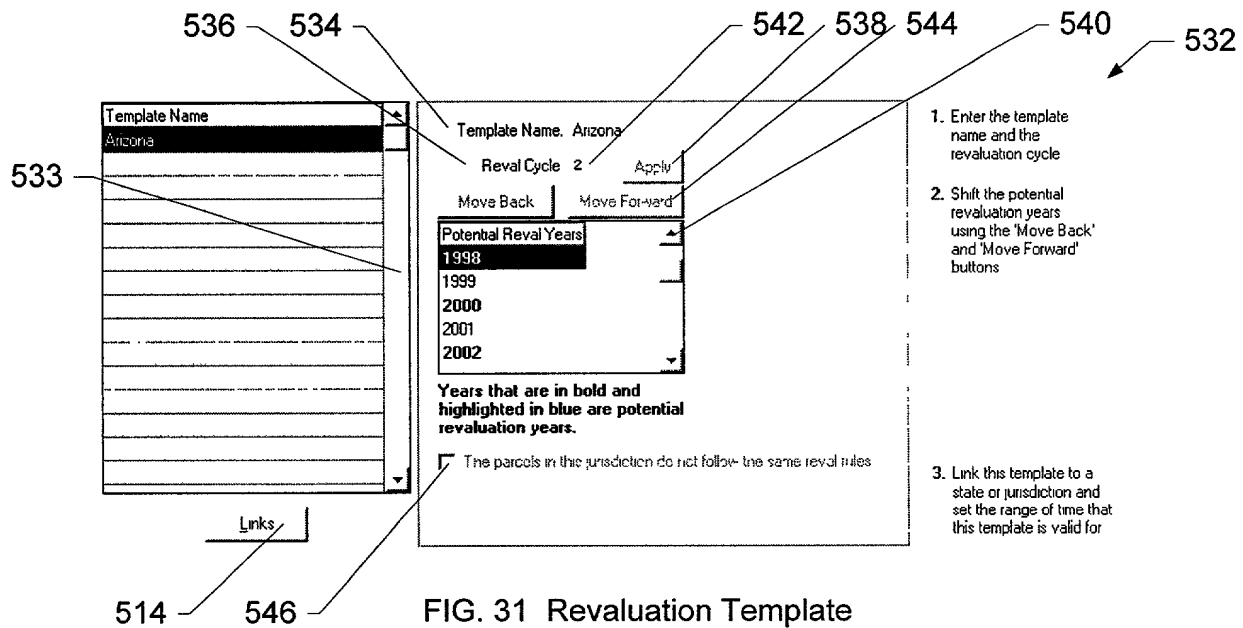
FIG. 27 Templates

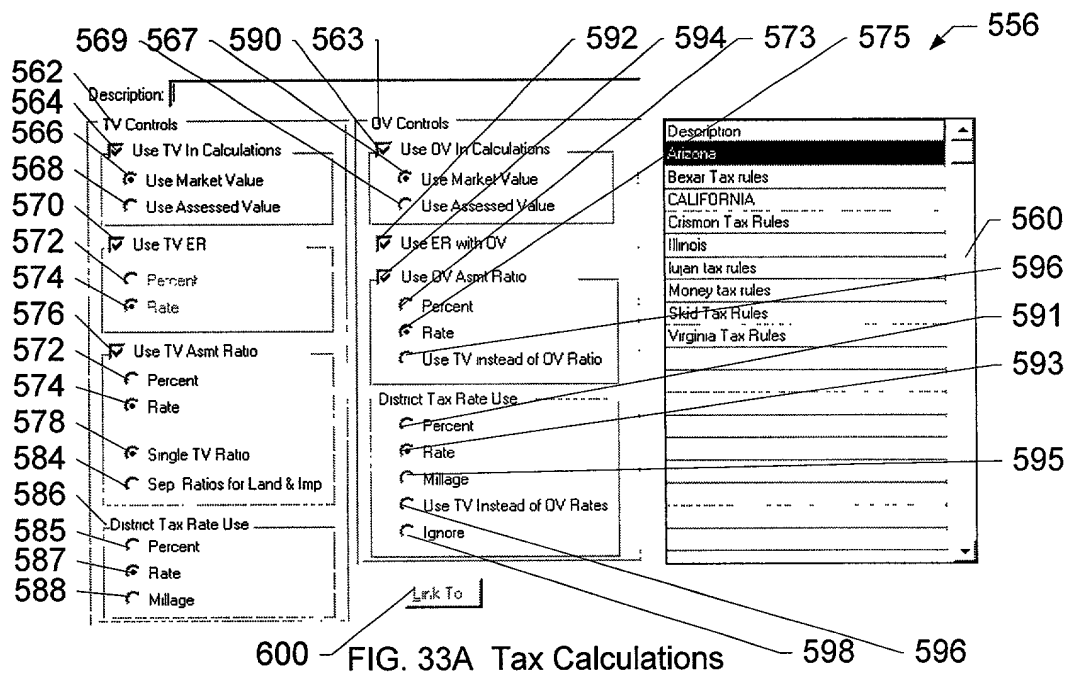
FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

Tracks	Template Description	Template Name
All	Tax Calculation	Arizona Do Not Modify
All	Valuation Control	Arizona Do Not Modify
All	Appeal Control	Arizona Do Not Modify
REAL	Installment Rules	Arizona
PERPF	Installment Rules	Arizona
SUP	Installment Rules	Arizona
NAV	Installment Rules	Arizona
All	Dynamic Labels	Arizona Do Not Modify
All	Tax Year Dates	Arizona

FIG. 30 Templates by Year





600 FIG. 33A Tax Calculations

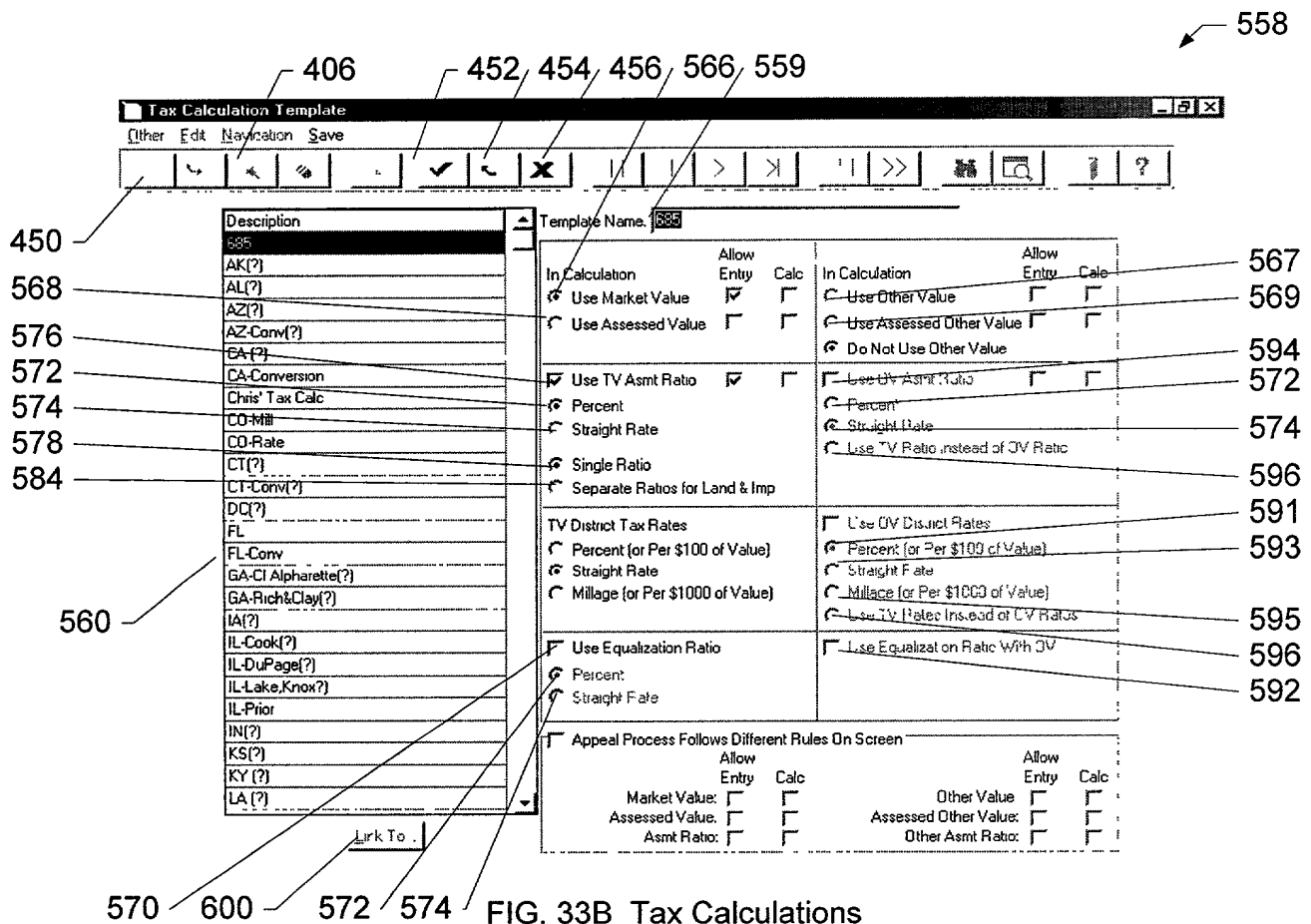
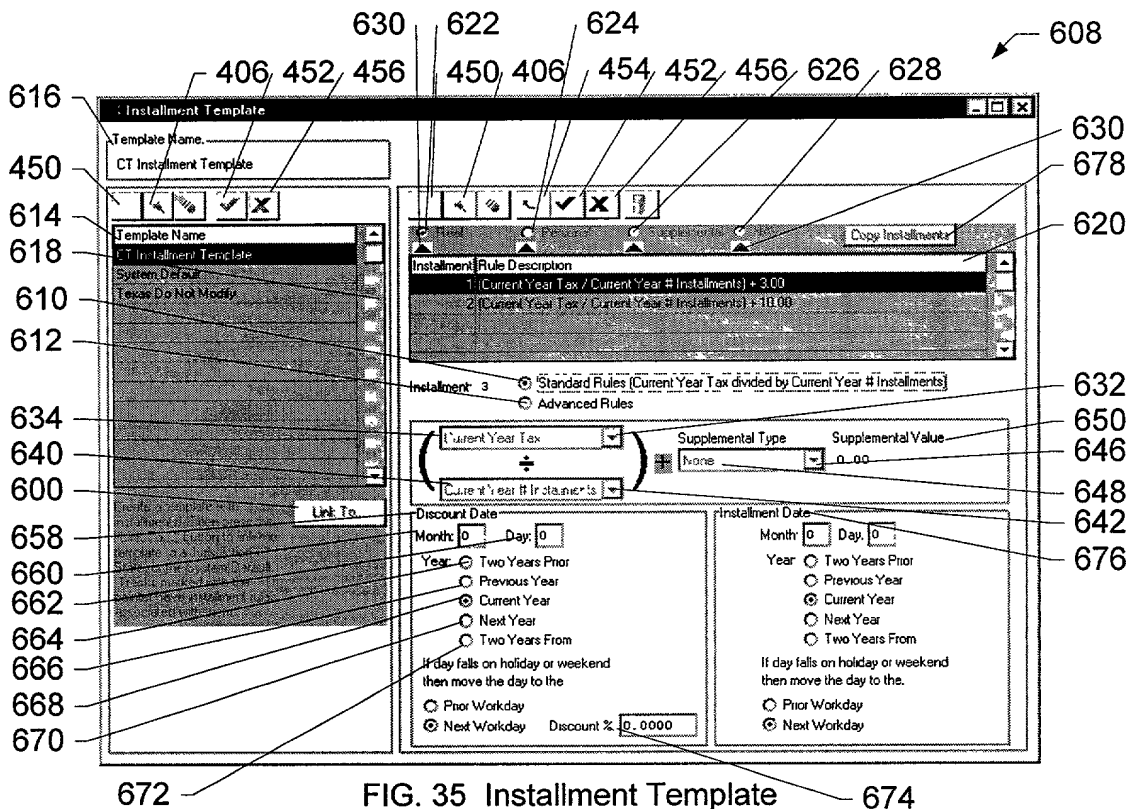
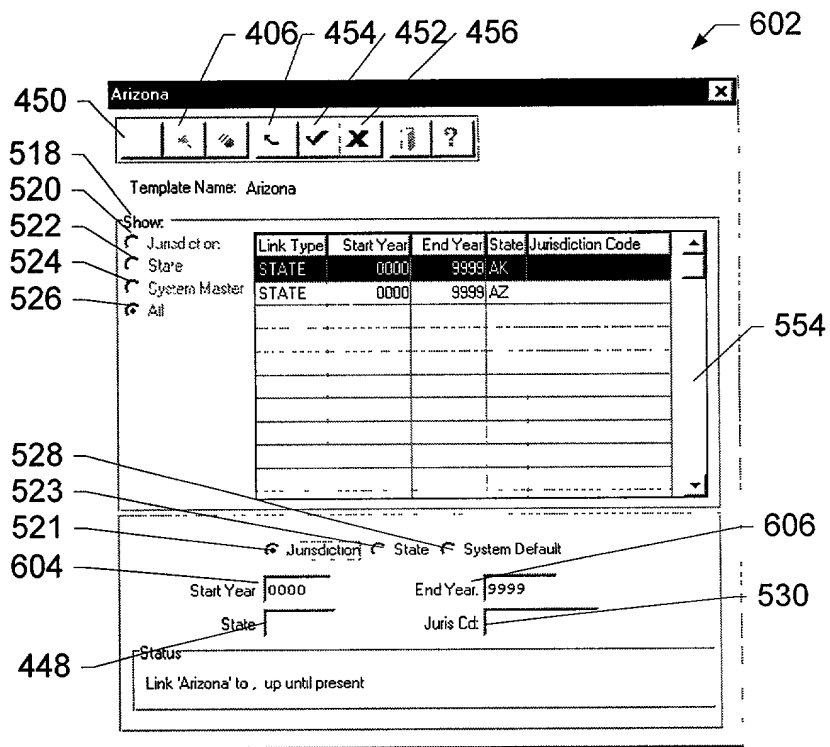


FIG. 33B Tax Calculations



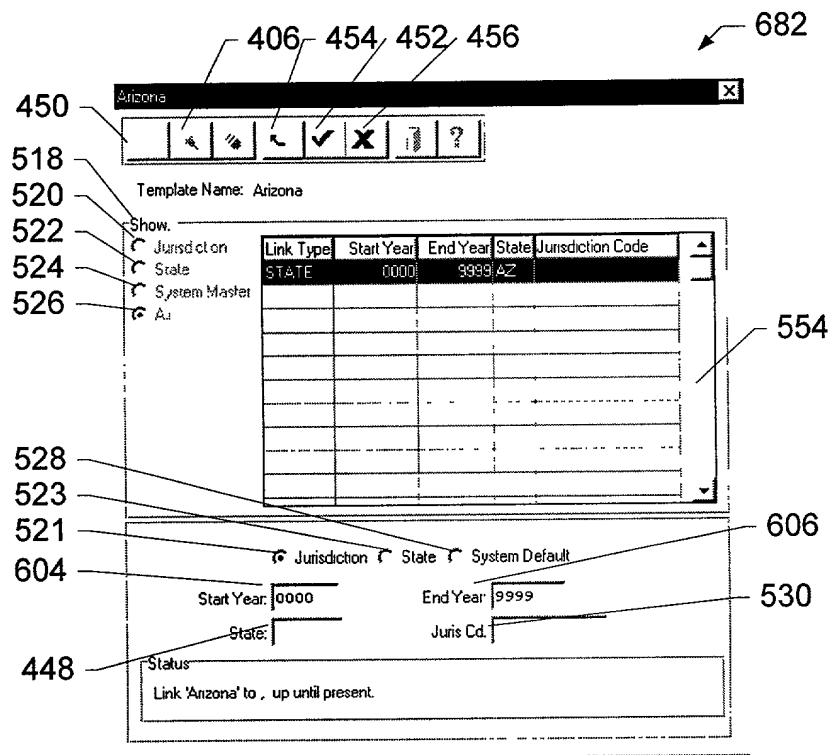


FIG. 36 Installment Templates Link To

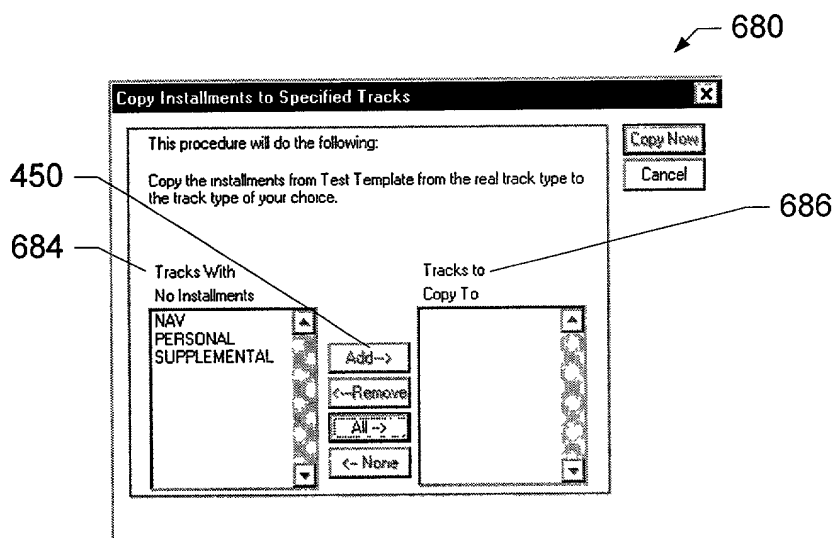


FIG. 37 Copy Installments Dialog Box

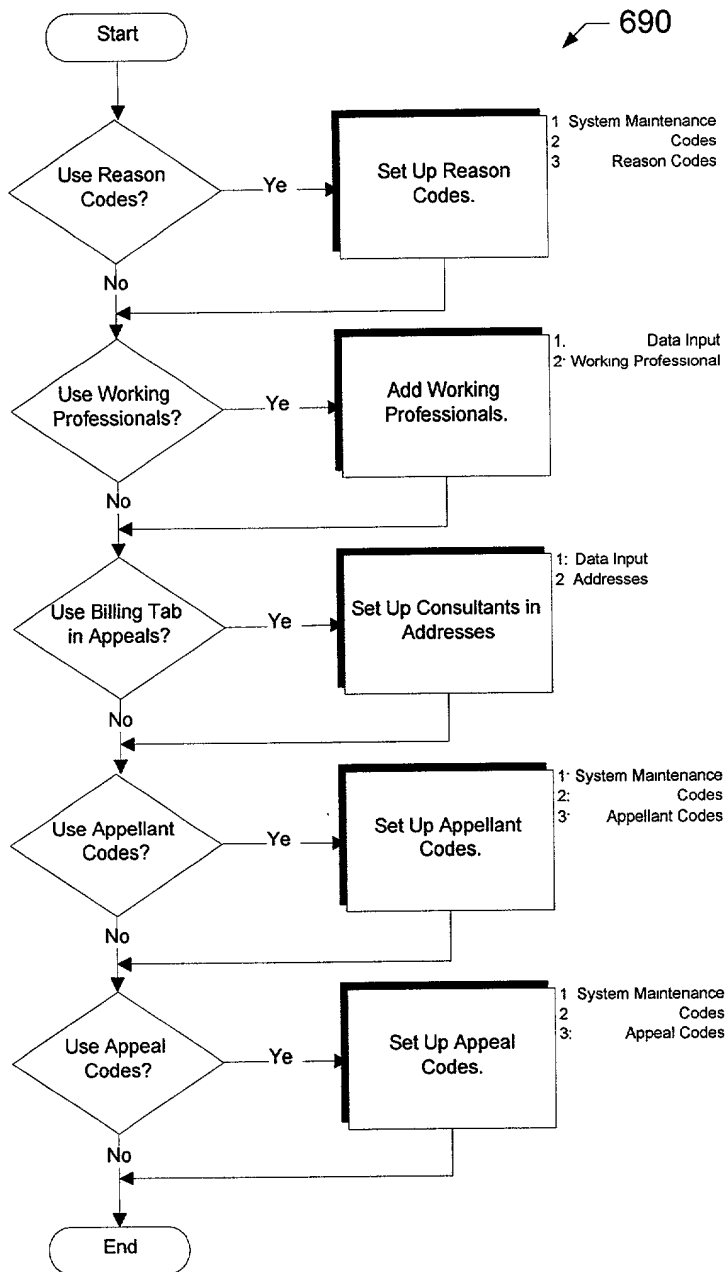


FIG. 38 Appeals Set Up

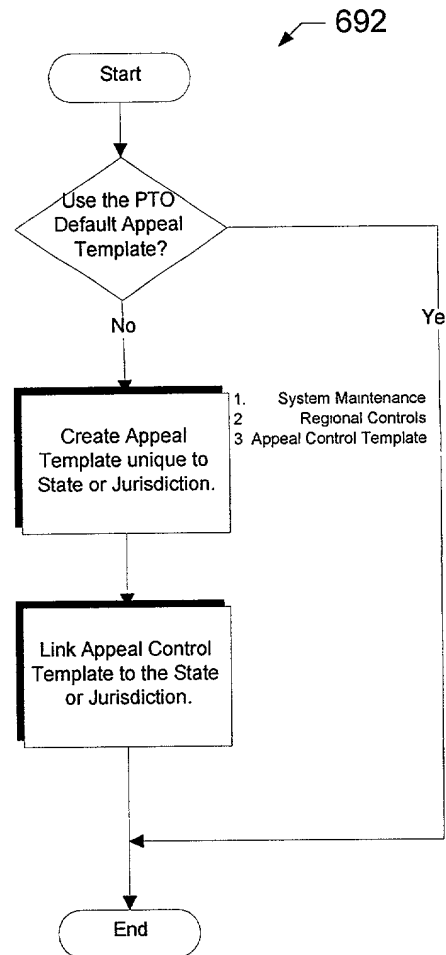


FIG. 39 Appeal Control

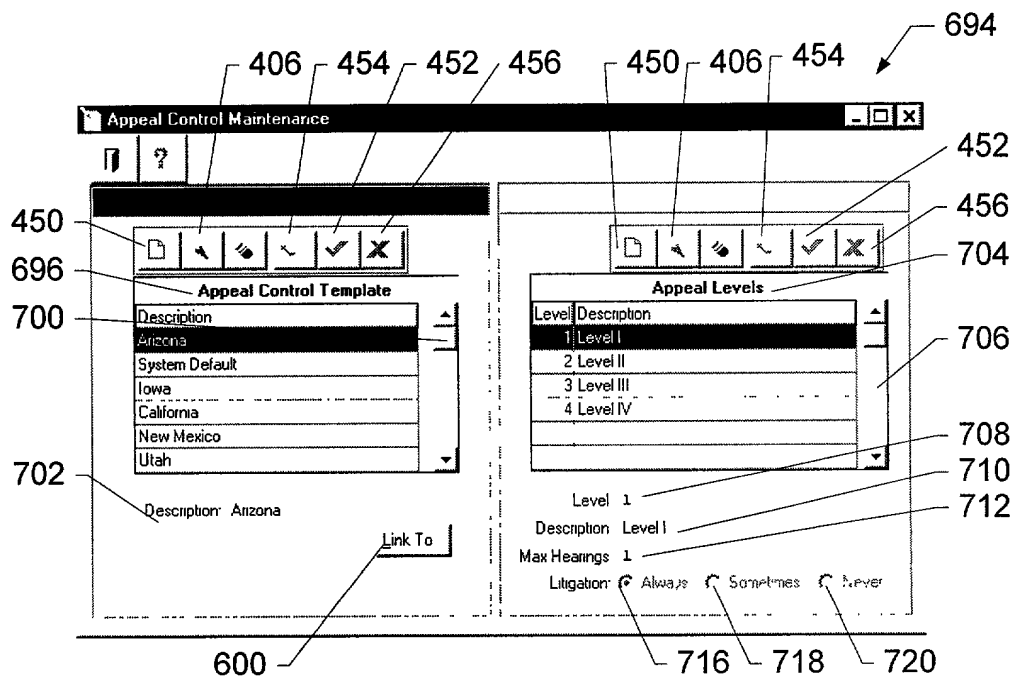


FIG. 40 Appeal Control

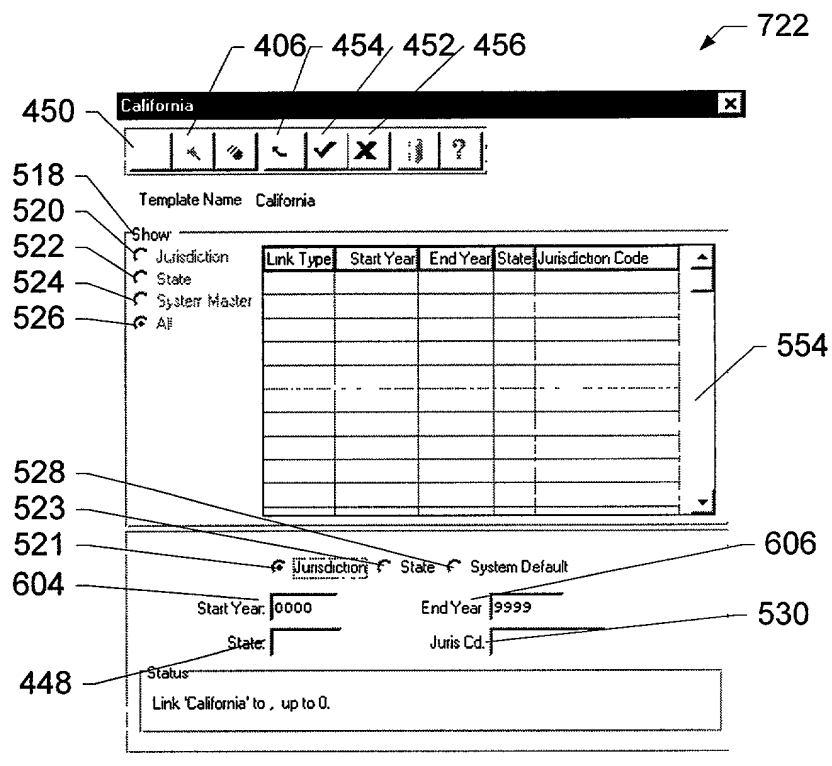


FIG. 41 Appeal Control Link

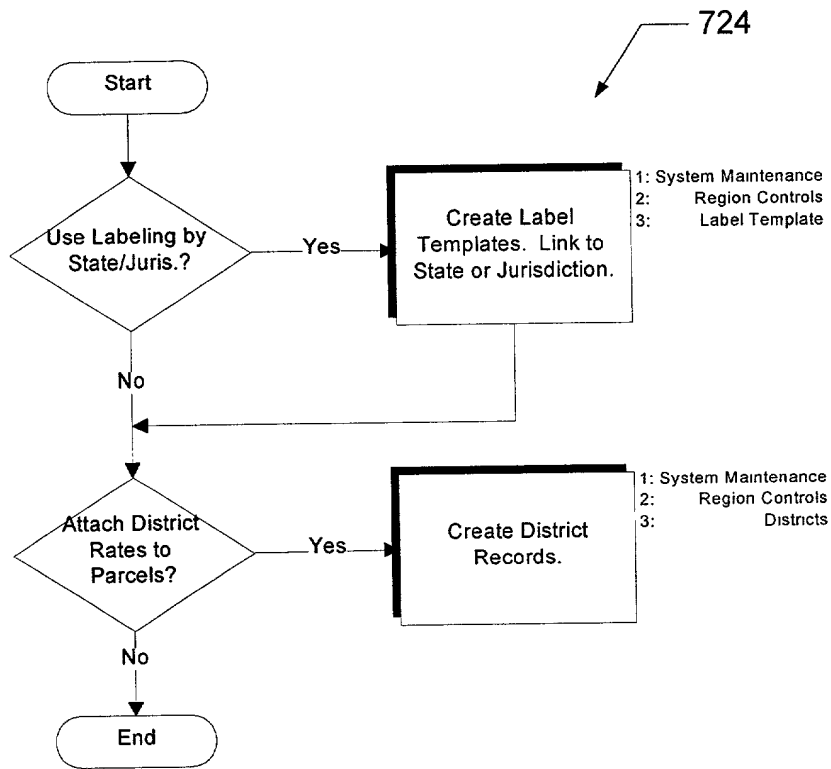


FIG. 42 Dynamic Labeling and Districts

726

731

734

730

732

728

736

740

600

FIG. 43A Label Template

Label Name: \_\_\_\_\_

Label Templates		Label List	
Template Name		Label	New Label
Master		Asd OV	Asd OV
FL		Asd TV	AV
AZ		Asd TV Imp	AV Imp
CA		Asd TV Land	AV Land
Crismon Labels		Asd TV Imp	AV Imp
money labels		Asd TV Land	AV Land
		Decision OV Ratio	Decision OV Ratio
		Decision OV Ratio	Decision OV Ratio
		OV	OV
		OV Dst Tax Rate Use	OV Dst Tax Rate Use
		OV Dst Tax Rate Use	OV Dst Tax Rate Use
		OV ER Treatment	OV Eq Mult
		OV ER Tmnt	OV Eq Mult
		OV Increase	OV Increase

Link To: \_\_\_\_\_



744

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

762

456

454

746

Dist Code:      Class:      [Icons]

748

750

752

754

756

758

760

Dist Code:  Description:

Class:

TV Rate:

OV Rate:

☐ Special District

Type:

Use in Update?: ☒

FIG. 45 - District Set Up